USER'S MANUAL

SCOUT© EMPLOYEE PROMOTION PROCESS

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SCOPE

This document addresses the processes, procedures, and requirements for the COTS software SCOUT Employee Promotion Processing© developed by HPC-COM LLC.

BACKGROUND

SCOUT Employee Promotion Processing© can automate tasks previously done manually or provide easier and faster accomplishment of tasks previously performed using older software, thus enhancing productivity.

I. ACCESSING SCOUT EMPLOYEE PROMOTION PROCESSING©

SCOUT Employee Promotion Processing© is embedded in the SCOUT Suspense Tracker© application as a module add-on. From the default app TASK MGMT, Promotion Processing may be accessed from the SCOUT Suspense Tracker© left-hand Apps menu (See Figure 1) in the same manner as other module add-ons.

Figure 1 – SCOUT Employee Promotion Processing© App located in left-hand menu

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II. EMPLOYEE PROMOTION PROCESSING

After clicking on the SCOUT Employee Promotion Processing© App link on the home page, you will see links at the top of the menu column (left side of page). They include:

1) About
2) New
3) My Actions
4) HR Promotion Guide

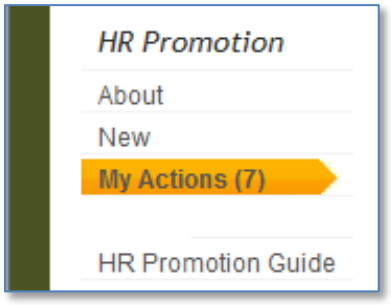

Figure 2 - Employee Promotion Processing Links

EMPLOYEE PROMOTION PROCESSING "About" Link

The first link entitled "About" opens a page that describes the current workflow for Employee Promotion Processing. This workflow may be modified to meet the requirements of the using organization. In this User's Manual we will be following the process used by the Army Criminal Investigations Laboratory.

EMPLOYEE PROMOTION PROCESSING "New" Link

The second link entitled "New" opens a function capability (see Figure 3 – Initiating the employee Promotion process) that allows the logged-in user (usually the Branch Chief) to initiate an employee Promotion process.

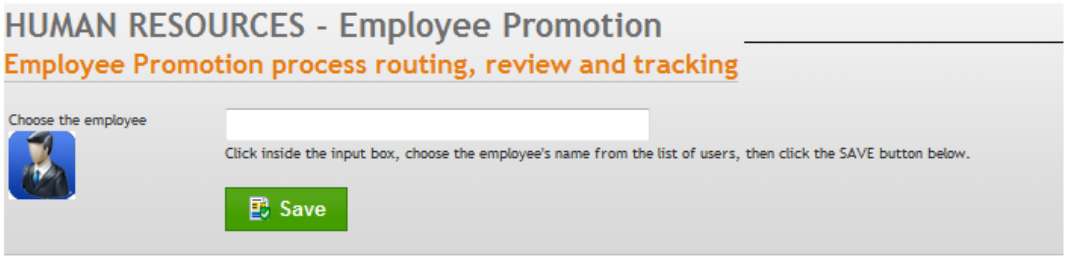
HUMAN RESOURCES - Employee Promotion
Employee Promotion process routing, review and tracking
Choose the employee
Click inside the input box, choose the employee's name from the list of users, then click the SAVE button below.
Save

Figure 3 – Initiating the employee Promotion process

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The logged-in user may click inside the input box. This action will open a dialogue window with a list of users. Choose the to-be-promoted employee to initiate the Promotion process. Click the SAVE button. A new page will appear which allows the user to enter text or upload attachments to explain the nature of the promotion recommendation (Figure 4 - Enter text or upload attachments).

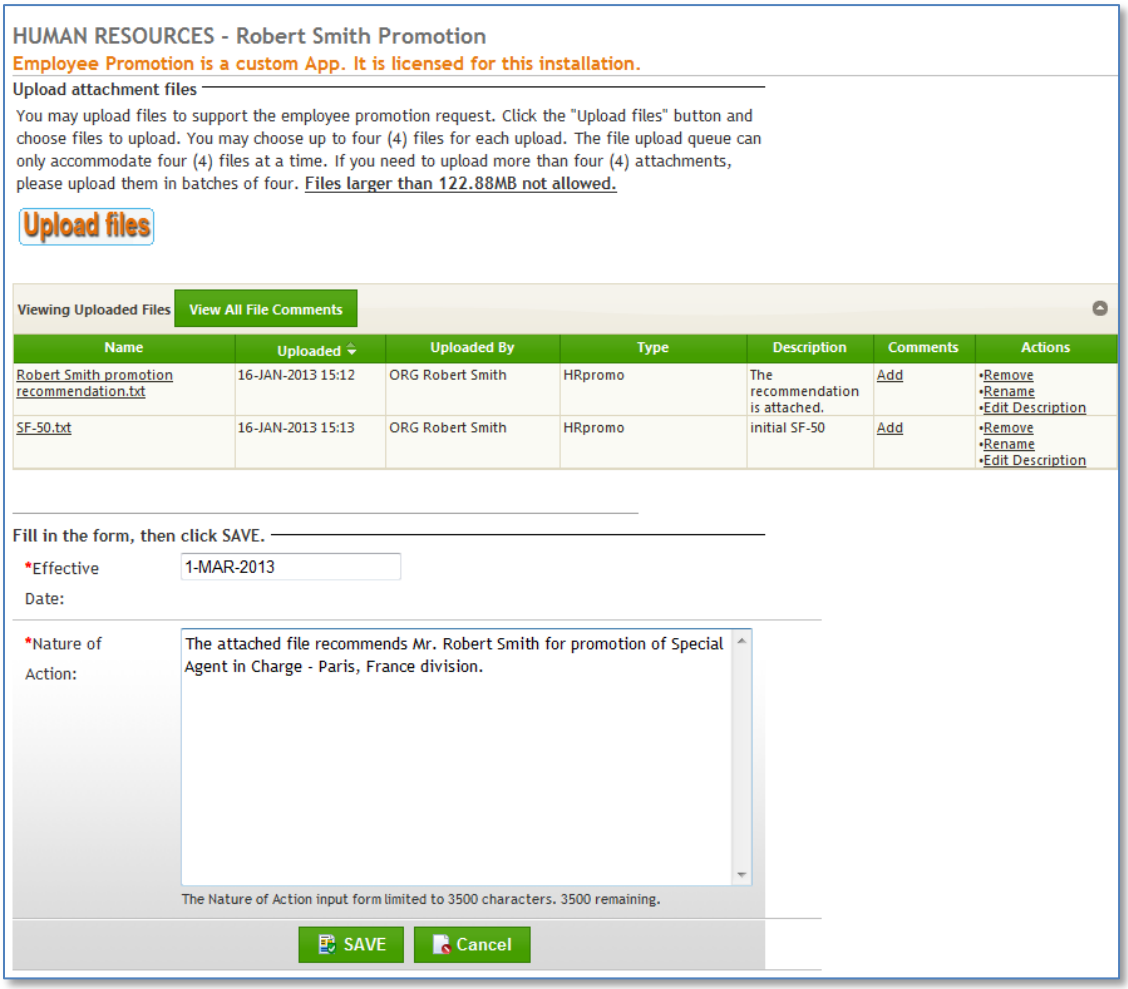
HUMAN RESOURCES - Robert Smith Promotion
Employee Promotion is a custom App. It is licensed for this installation.
Upload attachment files
You may upload files to support the employee promotion request. Click the "Upload files" button and choose files to upload. You may choose up to four (4) files for each upload. The file upload queue can only accommodate four (4) files at a time. If you need to upload more than four (4) attachments, please upload them in batches of four. Files larger than 122.88MB not allowed.
Upload files
Viewing Uploaded Files
View All File Comments
Name
Uploaded
Uploaded By
Type
Description
Comments
Actions
Robert Smith promotion recommendation.txt
16-JAN-2013 15:12
ORG Robert Smith
HRpromo
The recommendation is attached.
Add
•Remove •Rename •Edit Description
SF-50.txt
16-JAN-2013 15:13
ORG Robert Smith
HRpromo
initial SF-50
Add
•Remove •Rename •Edit Description
Fill in the form, then click SAVE.
*Effective Date:
1-MAR-2013
*Nature of Action:
The attached file recommends Mr. Robert Smith for promotion of Special Agent in Charge - Paris, France division.
The Nature of Action input form limited to 3500 characters. 3500 remaining.
SAVE
Cancel

Figure 4 - Enter text or upload attachments

EMPLOYEE PROMOTION PROCESSING "My Actions" Link

The third link entitled "My Actions" opens an actions capability with a table containing clickable links to the various actions. The table contains tabs that filter the displayed action data:

- **Assigned To**: Clicking this tab will filter the data in the table to show only those actions required by those users who must review or act upon the Promotion process.
- **COPY_ONLY**: Clicking this tab will filter the data in the table to show only those users who are being informed of the employee Promotion, but who have no actions to take.

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- **CREATED BY**: Clicking this tab will filter the data in the table to show only the Promotion process for the initiating user. The user may use this tab to link to the status page that shows the current status of the processing.
- **COMPLETED ACTIONS**: Clicking this tab will filter the data in the table to show those actions that have been completed by those users who must review or act upon the Promotion process.
- **PROMOTION COMPLETED**: Clicking this tab will display a link to the status of a Promotion process that has been closed (usually because the Promotion process has been completed). The ability to close a Promotion process is limited to certain users and these permissions are dictated by Promotion process workflow and rules.

1. Created By tab

When a user (usually a Branch Chief) initiates a Promotion process (See Section 0), the user is taken to the Promotion Process Actions page. The user may also access the Promotion process actions page by click the “Created By” tab on the My Actions page (Figure 5 - The Actions Page for)

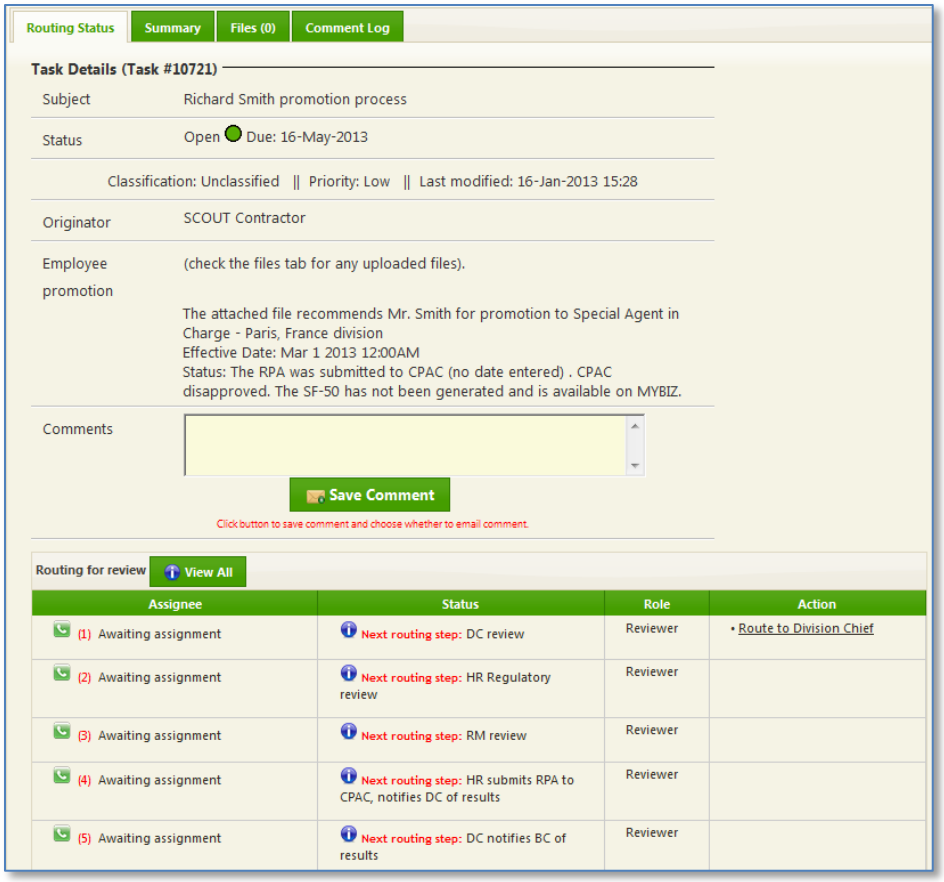
Routing Status
Summary
Files (0)
Comment Log
Task Details (Task #10721)
Subject
Richard Smith promotion process
Status
Open
Due: 16-May-2013
Classification: Unclassified || Priority: Low || Last modified: 16-Jan-2013 15:28
Originator
SCOUT Contractor
Employee promotion
(check the files tab for any uploaded files).
The attached file recommends Mr. Smith for promotion to Special Agent in Charge - Paris, France division
Effective Date: Mar 1 2013 12:00AM
Status: The RPA was submitted to CPAC (no date entered) . CPAC disapproved. The SF-50 has not been generated and is available on MYBIZ.
Comments
Save Comment
Click button to save comment and choose whether to email comment.
Routing for review
View All
Assignee
Status
Role
Action
(1) Awaiting assignment
Next routing step: DC review
Reviewer
• Route to Division Chief
(2) Awaiting assignment
Next routing step: HR Regulatory review
Reviewer
(3) Awaiting assignment
Next routing step: RM review
Reviewer
(4) Awaiting assignment
Next routing step: HR submits RPA to CPAC, notifies DC of results
Reviewer
(5) Awaiting assignment
Next routing step: DC notifies BC of results
Reviewer

Figure 5 - The Actions Page for Promotions

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INITIATOR ACTIONS SECTION

The following describes the actions the promotions process initiator may take as part of the process.

1. Delete or Close

A button in the upper right portion of the page allows the initiator to delete the process. A second button allows the initiator to close the process. Processes are usually closed only after all actions have been completed by all users.

2. Upload Attachments

Clicking the Files tab allows the initiator to upload attachments to support the Promotion process workflow. Any files uploaded during the process initiation step will appear in the table on this page (Figure 6 - The upload file page).

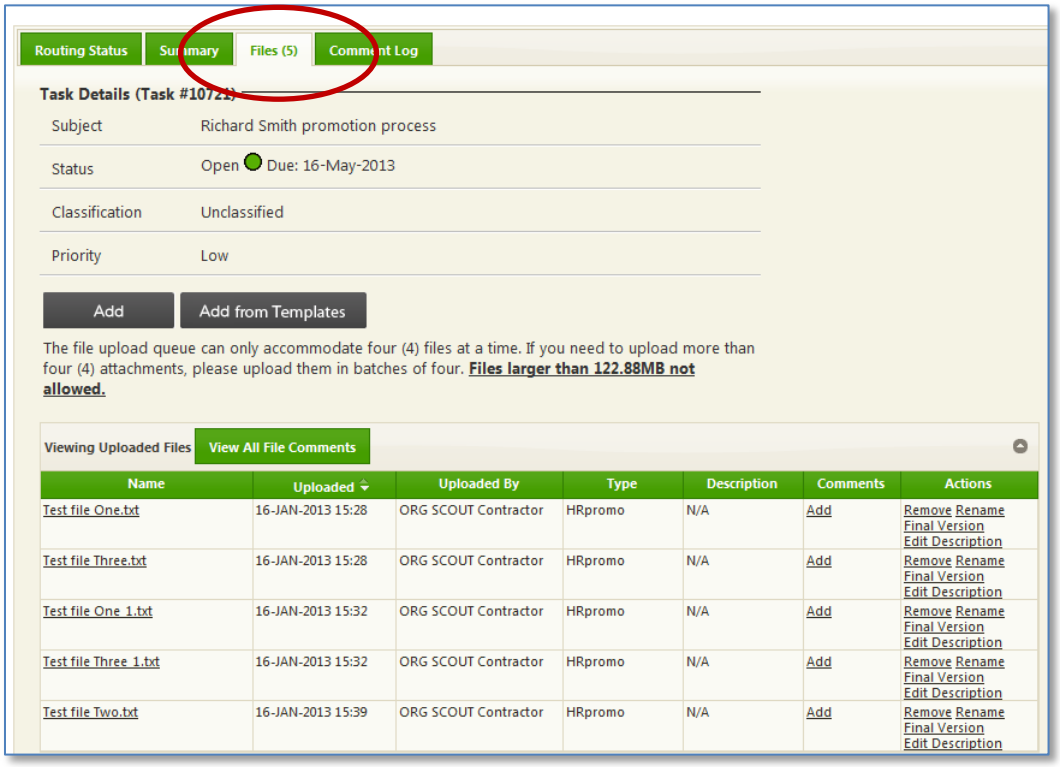

Figure 6 - The upload file page

Clicking the "ADD" button will open a dialogue window that allows the user to choose a file from her/his computer to upload. A progress bar will appear that shows the progress of the upload. After the file is uploaded data about the file will appear in the table on the page. The user will see three actions links in the table's Action column (far right of the table). The three links are:

- Remove (This will remove the upload file from the data table)

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- Rename (This allows the user to change the name of the uploaded file. Use caution to make sure you do not change the file extension type when you change the file name.)
- Description (The user may click this link and enter a description of the uploaded file.) When the user clicks the Description link, a dialogue box will appear with the default entry of "N/A." The user must delete the default entry of "N/A" and enter a brief description of the uploaded file.

3. Routing

Clicking the Routing Status tab (Figure 7 - Click Routing Status tab) will allow the user to view the current status of the process as well as take actions related to routing the task according to the dictated workflow steps.

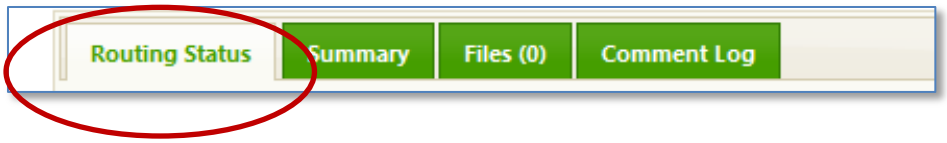

Figure 7 - Click Routing Status tab

The Routing for Review table shows the workflow steps as dictated by the organization's rules. In the example shown (Figure 8 - The workflow routing steps) routing has not yet begun and each workflow step is awaiting the assignment of the person to whom the task should be routed. The Status column shows each routing step. Under the Action column are those actions available to the logged-in user. In the example shown, the user is the one who initiated the process. She/he has only one action to take, *Route to Division Chief*, which is the first step of the process.

Figure 8 - The workflow routing steps

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4. Route to Division Chief

The first notification is to the Division Chief. Clicking the *Route to Division Chief* link in the Actions column will open a dialogue to automate an email to the Division Chief (Figure 9 - Notify the Division Chief). Below the email button is a button labeled CLICK. Use this button to choose an alternate for the Division Chief. The automated email will notify the Division Chief (or the chosen alternate) that there are actions to take to continue the Employee Promotion Process workflow (Figure 10 - Sample notification email).

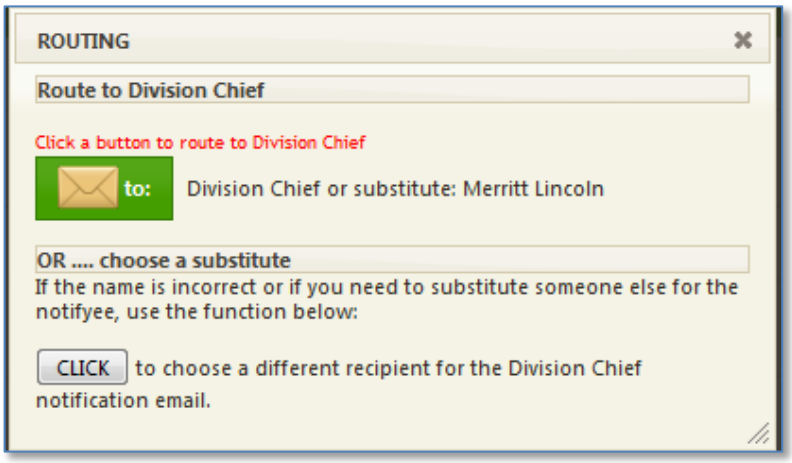
ROUTING
Route to Division Chief
Click a button to route to Division Chief
to:
Division Chief or substitute: Merritt Lincoln
OR .... choose a substitute
If the name is incorrect or if you need to substitute someone else for the notifyee, use the function below:
CLICK
to choose a different recipient for the Division Chief notification email.

Figure 9 - Notify the Division Chief

When the Division Chief opens the notification email it will contain brief information about the Promotion process. The email will contain a clickable link which will take the Division Chief Directly to the Employee Promotion Process Action page where the Division Chief may take any required or options actions.

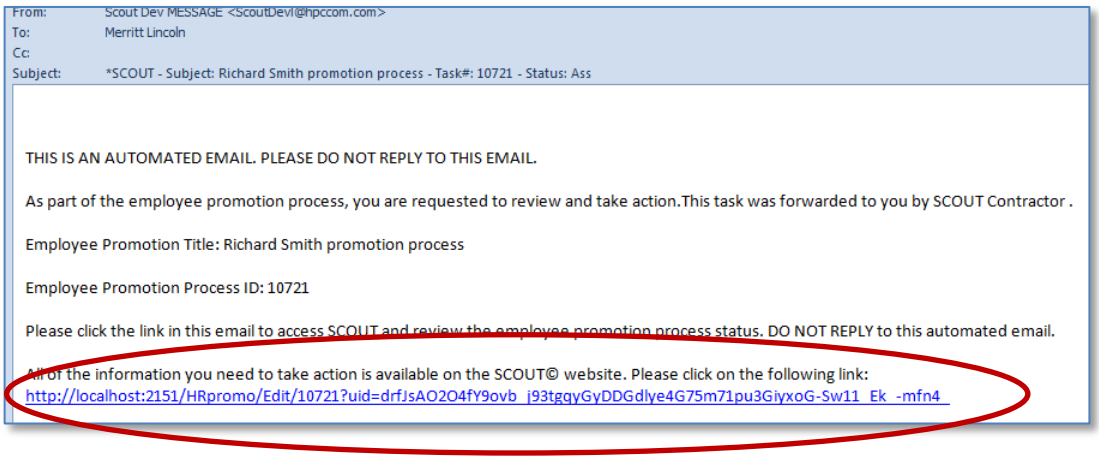
From: Scout Dev MESSAGE <ScoutDevl@hpccom.com>
To: Merritt Lincoln
Cc:
Subject: *SCOUT - Subject: Richard Smith promotion process - Task#: 10721 - Status: Ass
THIS IS AN AUTOMATED EMAIL. PLEASE DO NOT REPLY TO THIS EMAIL.
As part of the employee promotion process, you are requested to review and take action.This task was forwarded to you by SCOUT Contractor .
Employee Promotion Title: Richard Smith promotion process
Employee Promotion Process ID: 10721
Please click the link in this email to access SCOUT and review the employee promotion process status. DO NOT REPLY to this automated email.
All of the information you need to take action is available on the SCOUT© website. Please click on the following link:
http://localhost:2151/HRpromo/Edit/10721?uid=drfJsAO2O4fY9ovb_j93tgqyGyDDGdlye4G75m71pu3GiyxoG-Sw11_Ek_-mfn4_

Figure 10 - Sample notification email

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The Actions Page refreshes to show the status of the Division Chief Notification. The Division Chief's name now appears in the Assignee column. The date and time of the email notification is shown in the Status column.

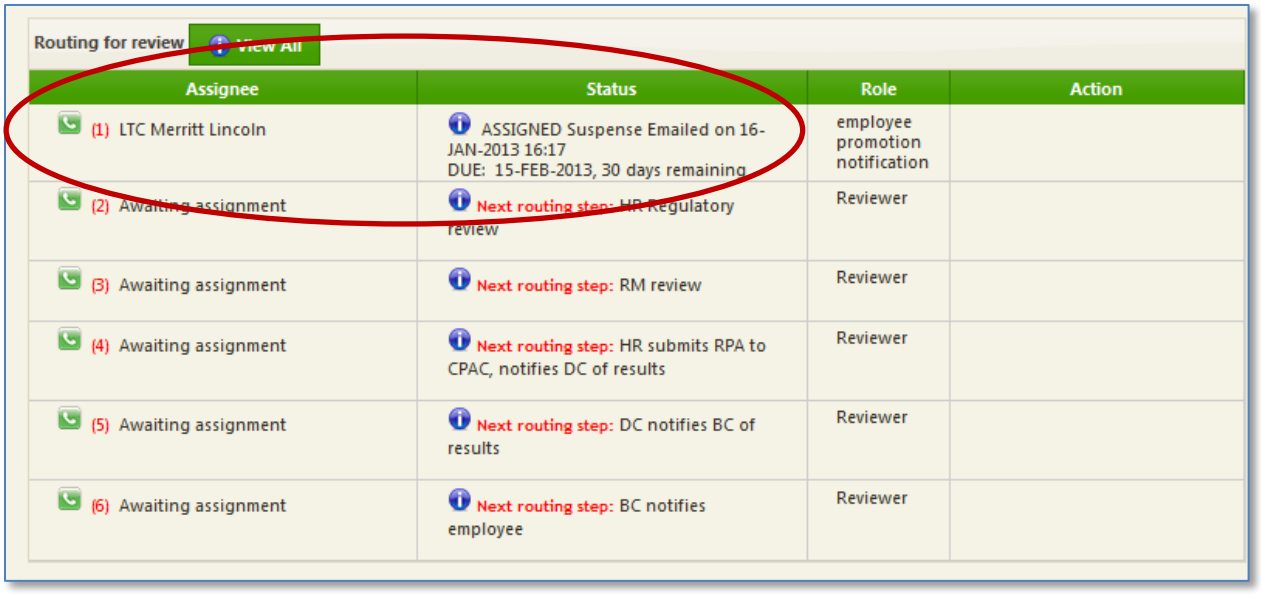

Figure 11 - Division Chief Notification status

DIVISION CHIEF ACTIONS

The following are the actions to be taken by the Division Chief.

When the Division Chief logs into the system, the Action links under the Actions column will be those actions available to the Division Chief. There are three (3) Actions available:

- Terminate Action
- Notify HR
- Comment

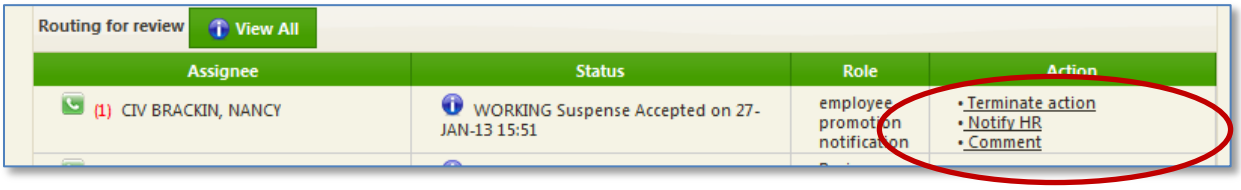

Figure 12 - Division Chief Actions

Terminate Action: Clicking the Terminate Action link will open the Terminate Action dialogue window (Figure 13 - Terminate Action). A justification for the termination is required. Clicking the SAVE button will automate an email notification to the initiator informing of the

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termination along with the justification. The initiator will have the opportunity to resolve any issues and re-route the task or may decide to close the task.

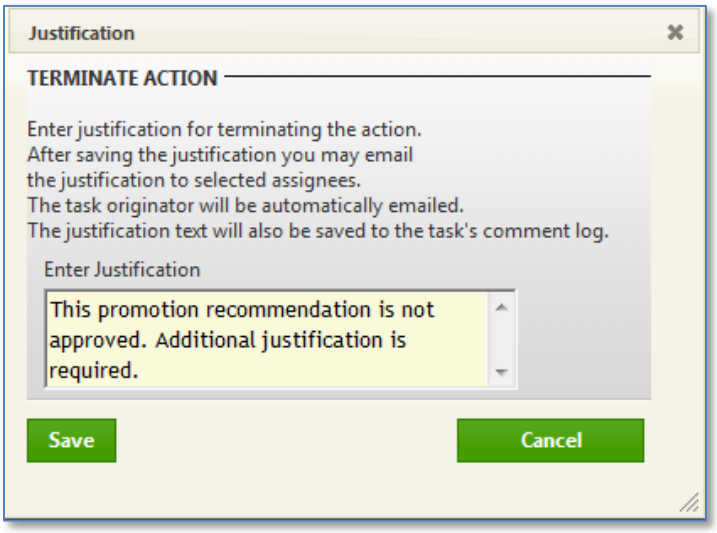
Justification
TERMINATE ACTION
Enter justification for terminating the action.
After saving the justification you may email
the justification to selected assignees.
The task originator will be automatically emailed.
The justification text will also be saved to the task's comment log.
Enter Justification
This promotion recommendation is not approved. Additional justification is required.
Save
Cancel

Figure 13 - Terminate Action

Comment: Clicking the Comment link will open a dialogue allowing the user to record a comment (Figure 14 - Adding a comment). Any comments entered can be read by clicking the Comment Log tab at the upper center of the page.

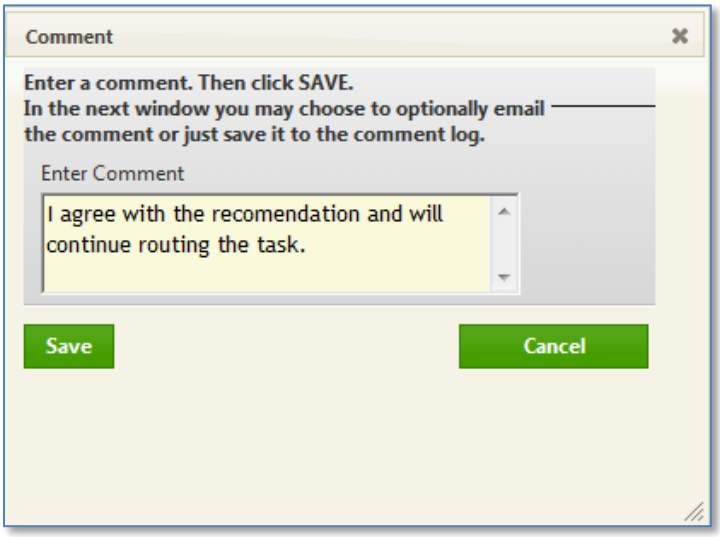
Comment
Enter a comment. Then click SAVE.
In the next window you may choose to optionally email the comment or just save it to the comment log.
Enter Comment
I agree with the recomendation and will continue routing the task.
Save
Cancel

Figure 14 - Adding a comment

Notify HR: Click the Notify HR link to open a dialogue to automate an email to the Human Resources POC (similar to Figure 9). Below the email button is a button labeled CLICK. Use this button to choose an alternate. The automated email will notify the POC (or the chosen alternate) that there are actions to take to continue the workflow. This notification will automatically complete the Division Chief's task.

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HUMAN RESOURCES ACTIONS

The following are the actions to be taken by the Human Resources POC.

When the Human Resources POC logs into the system, the Action links will be under the Actions column . There are three (3) Actions available:

- Return for info – Similar to the comment function as shown in Figure 14.
- TDA change required – Redirects the user to the TDA Change process application. See the TDA Change Process Users Guide for details.
- Notify RM - Similar to the function illustrated by Figure 9. This notification will automatically complete HR's task.

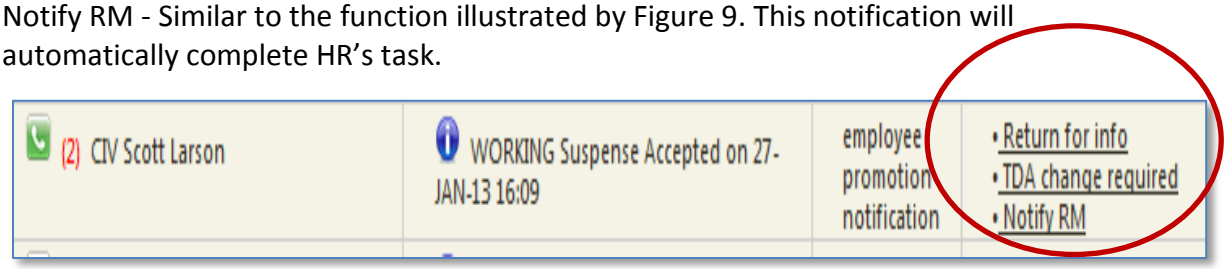

Figure 15 - HR Actions

RESOURCE MANAGER ACTIONS

The following are the actions to be taken by the Resource Manager POC.

When the Resource Manager POC logs into the system, the Action links will be under the Actions column. There are three (3) Actions available:

- Return for info – Similar to the comment function as shown in Figure 14
- Terminate Action - Similar to the function illustrated by Figure 13.
- Notify HR - Similar to the function illustrated by Figure 9. The workflow returns the task to HR to take action on submitting the task to CPAC. Notification will complete the RM task.

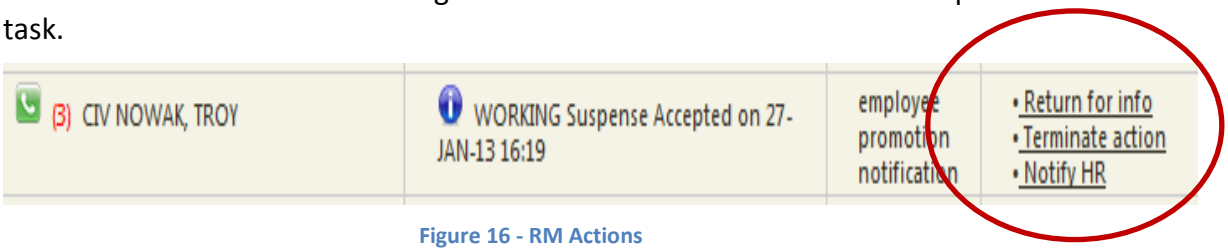

Figure 16 - RM Actions

SUBMITTING RPA TO CPAC

The following are the actions to submit the RPA to CPAC taken by the Human Resources POC.

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When the Human Resources POC logs into the system, the Action links will be under the Actions column. There are four (4) Actions available:

- Return for info – Similar to the comment function as shown in Figure 14
- Submit to CPAC – As shown in Figure 17, the window allows HR to record information about the CPAC submittal.

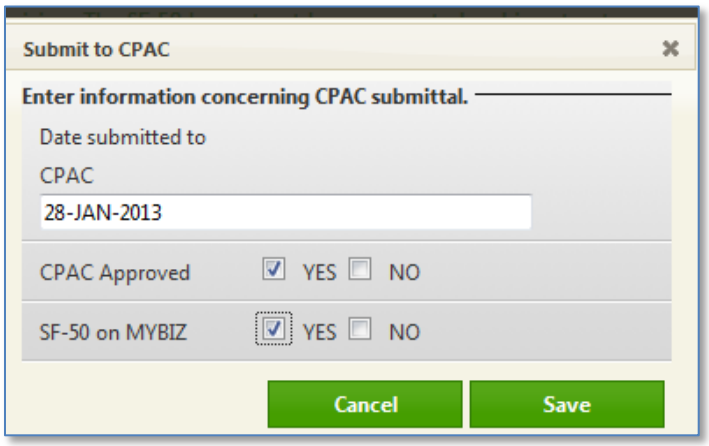

Figure 17 - HR submits to CPAC

- Terminate Action - Similar to the function illustrated by Figure 13.
- Report status to DC - Similar to the function illustrated by Figure 9. The workflow returns the task to DC to inform DC of the status. Notification will complete the HR task.

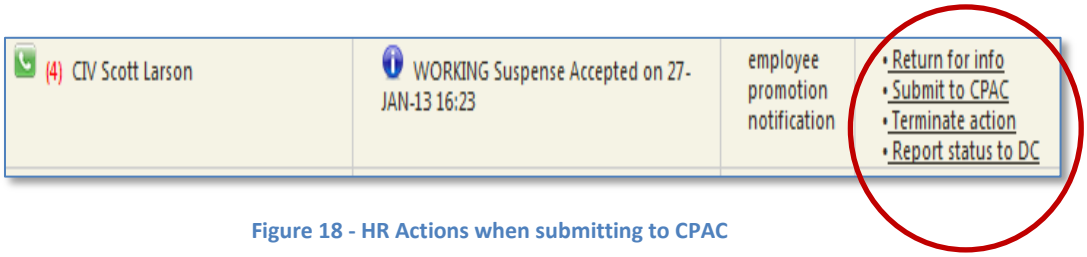

Figure 18 - HR Actions when submitting to CPAC

When DC is notified of the status, the actions available to DC include notifying the Branch Chief of the status.

When the Branch Chief is notified, the actions include notifying the promotable employee of the status.

EMPLOYEE PROMOTION PROCESSING"GUIDE" Link

Clicking the Guide link will take the user to the Scout Learning Center site where this document is available for viewing.

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